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ABSTRACT

A framework is described for the development of knowledge, skills, and resources necessary to conduct school planning and evaluation activities. The major issues pertaining to a building-based planning and evaluation model are discussed. The building-level approach is recommended because it results in greater efficiency in the development, refinement, and delivery of school services for students. The comprehensive study of a school, as described here, can be easily infused into the accreditation process. These processes were field tested in elementary and secondary schools in Michigan. It was found that the task force approach to planning successfully increased staff involvement in program planning, development, and evaluation. Building personnel were more accepting and supportive of programs which they helped to design. According to the model, involvement of the school principal, the project coordinator, and the building consultant are all essential. The external review team, consisting of accreditation personnel, monitors the progress and products of the school staff. This model can be implemented at the request of the school principal or a divisional director. It consists of five stages: (1) orientation; (2) self-study; (3) cooperative planning; (4) pilot implementation and evaluation; and (5) full-scale implementation and evaluation. (GDC)

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BUILDING BASED PLANNING AND EVALUATION
A
DISCUSSION PAPER

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This paper describes a framework for assisting building staffs in the development of knowledge, skills, and resources necessary to conduct their own planning and evaluation activities. The purpose of the paper is to present the concept and the major issues pertaining to a building based planning and evaluation model for discussion and input by local educators.

RATIONALE

While there is considerable desire and effort by building staffs to improve the educational services offered to students, these improvement efforts are generally initiated in an informal and somewhat random fashion. Most often it seems that program improvement activities at the building level may be in response to a crisis or potential crisis situation reinforced by staff, and/or administrative concern.

At the present time there does not appear to be any systematic approach to building level planning and evaluation that relies on large scale staff involvement or the continuous assessment of student, staff, and community needs. However, the 1977-78 Superintendent's Budget Advisory Committee did recommend that an educational audit be established that would anually review the educational programs within each building or program. It was also suggested that members from within the building and district at large should conduct such an audit. The consequences of implementing a building level planning and evaluation approach is, quite simply greater efficiency in the development, refinement, and delivery of building services for students.

The process described in this paper is designed to be easily infused into the North Central School Accreditation Process thus allowing a secondary

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building (or interested elementary schools) to complete the necessary accreditation process while conducting a comprehensive study of their building.

PILOT ACTIVITIES

During the 1976-77 and 1977-78 school years, Building Based Planning and Evaluation activities were field tested at Central High School and Sibley and Straight Elementary Schools. The staffs in these buildings, working in conjunction with the Office of Curriculum Planning and Evaluation, volunteered to pilot processes and techniques which comprise the model. Each school was assigned a Consultant to assist in implementing project activities.

During the 1976-77 school year, at the request of the building principal, a task force of teachers and one administrator at Central High School Designed and conducted a comprehensive needs assessment. In the fall of 1977, they reported their findings and recommendations to the total staff. During the 1977-78 school year, ten task forces comprised of teachers and administrators worked to develop plans for addressing the highest priority needs. As a result of their combined efforts, a Comprehensive Plan to improve Central High School was developed. During the summer of 1978, groups of teachers and administrators prepared to implement pilots of their plans in the fall.

At Sibley and Straight Elementary Schools, task forces of teachers worked at developing plans to address need areas identified as highest priority by the staff. During the 1977-78 school year, these groups implemented and evaluated the plans they developed. As a result of these pilot planning and evaluation efforts many changes have taken place in these two schools.

A number of factors have been apparent in evaluating these projects:

1. Utilizing a task force approach for planning activities appears to be a successful strategy for increasing staff involvement in program planning, implementing and evaluation.

2. Building principal involvement is essential to ensure success of the planning and evaluation activities within the building.

3. The role fulfilled by the building consultant helps facilitate the completion of planning and evaluation activities in the schools.

4. Building personnel tend to be more accepting and supportive of programs thay have assisted in designing/identifying.

5. Within the time limitations of building operation, most planning and evaluation activities can be completed. However, additional time is required beyond the contract day for staff to organize and plan on the basis of objective data.

6. Building personnel, with the assistance of a consultant, can develop a capability to conduct planning and evaluation activities.

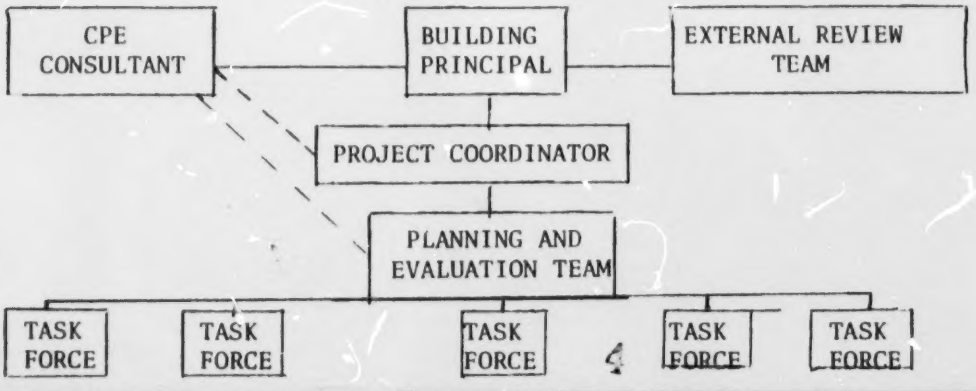
DESCRIPTION OF A DISTRICT-WIDE MODEL FOR BUILDING BASED PLANNING AND EVALUATION

The district-wide model for building based planning and evaluation proposed here is designed to involve schools in an objective examination of their programs and services. Its purpose is to facilitate continuous improvement of the services provided to students.

ORGANIZING THE SCHOOLS FOR BUILDING BASED PLANNING AND EVALUATION

Obviously, the primary commitment for improving building planning and evaluation capability must come from the building itself. If a successful approach to curriculum improvement is to be developed, the process must involve the building staff. The following chart depicts the building organizational plan for implementation:

FIGURE I
ORGANIZATIONAL PLAN



The building staff and personnel will assume various roles and organizational patterns during the different phases of the BBPE model. Regardless of how the building personnel are organized to accomplish the tasks of the BBPE model, it is the principal who reviews and approves all decisions before being implemented. The following are suggested roles and organizational patterns which have been conducive to successful implementation of the BBPE model.

Role of the Principal

The building principal must assume an active and involved leadership role to ensure success of the planning and evaluation activities to be conducted in the building. This "active and involved" role includes: developing functional knowledge of the BBPE model; maintaining a direct working relationship with task force leaders, steering committee and project coordinator; disseminating progress and results of planning and evaluation efforts to central office administrators, community members and building staff; and reviewing and approving all major decisions. The building principal should consider assigning one person responsibility for sharing coordination of project activities. This person should report directly to the building principal. (In a small school building principals have successfully assumed this role.)

Role of the Project Coordinator

A full-time project coordinator (the building principal or designee) coordinates the implementation of all project activities. In addition, this person is a member of all advisory and planning committees and communicates to the principal their resource needs. The project coordinator also keeps the parent and student advisory committees (if established) aware of the project's progress. It is recommended that this person serve as chairperson of the Steering Committee because of the important, and often time-consuming, duties of the chairperson.

Planning and Evaluation Team

Composed of teachers, counselors, administrator and if possible students, the Planning and Evaluation Team serves three functions: (1) oversees, the entire project, (2) serves as a major decision-making body, and (3) acts as representatives of the school population.

As a managerial body, it is responsible for coordinating the many activities of the task forces. It monitors the work of task forces to be certain that tasks are completed appropriately and in as short a time as possible. It also serves the function of coordinating tasks performed by these different work groups.

The Team has the responsibility of assuring that the task force plans reflect the needs of all students in the school. It determines areas in which task forces will work based on survey information collected and reviews objectives and task force plans to ensure they are complete, accurate and appropriate. After review, this group makes recommendations to the principal for review and approval before being implemented.

Task Forces

Task forces are work groups comprised of teachers, aides, counselors, administrators and possibly students and parents. These groups are formed on a temporary basis to perform certain duties: problem definition within an area determined by the Steering Committee and principal, and task force plan development and implementation. When their tasks are completed, the work groups disband. The need for task forces to reunite may appear during the pilot implementation phase of the project. The number of people on a task force varies depending on the activity to be completed, but generally it is suggested that one task force not be larger than ten staff persons.

Building Consultant

A consultant from the Office of Curriculum Planning and Evaluation (OCPE) will be assigned to provide assistance in assessing building needs, identifying program options, developing management plans and acquiring the necessary skills/ training to conduct planning and evaluation activities. This consultant's primary responsibility is to facilitate all facets of the model in a manner which encourages efficient and functional implementation of the BBPE model by building personnel. In most cases, the roles of trainer, resource collector and liaison will allow the consultant to fulfill this primary responsibility.

Review Team

The External Review Team is comprised of an equal number of local educators and persons appointed by the North Central Association Chairperson. Their primary responsibility is to review the products of the building staff and to monitor their progress.

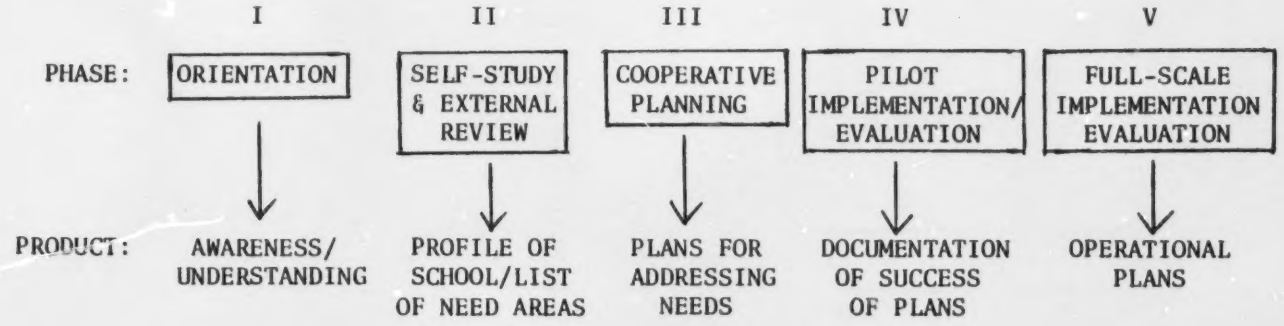
IMPLEMENTING THE MODEL

The model described below can be initiated in primarily two ways. First, a building principal may request assistance in reviewing the current educational program and planning for improvement. Secondly, divisional directors may request that certain high need schools engage in this process.

Figure II is a graphic depiction of the major phases of the building based planning and evaluation process. Each phase is described briefly on subsequent pages.

FIGURE II

A MODEL FOR BUILDING BASED
PLANNING & EVALUATION



I. ORIENTATION

To ensure that all project participants fully understand the process of building level planning and evaluation, a series of orientation sessions are conducted. Initially, the building principal will be provided with a general overview of the products and processes of the model. Secondly, the Project Coordinator and the Building Planning and Evaluation Team will receive the same overview with primary emphasis on the Self-Study phase.

As task forces are developed they receive an orientation to the model and the specifics on the phase they are entering.

II. SELF-STUDY

This phase of the model is designed to provide building staffs with a description of their school to utilize in identifying priority need areas.

Prior to entering a building, the CPE consultant will organize all available demographic information pertaining to the individual school (population, attendance, mobility, etc.) and gather perceptual data from all populations directly and indirectly involved with the school. This information will be provided to the building Planning and Evaluation

Team, in the form of a comprehensive school profile. This group, with assistance from the CPE consultant, will analyze this data to determine strengths and weaknesses in the school. The group will receive from the Office of Curriculum Planning and Evaluation a Handbook on Evaluating Your Schools Programs & Services and a list of minimal questions that should be addressed by analyzing the data. In addition to the demographic and perceptual information, the building staff will review a number of program areas including those required by the North Central Association, (objectives and priorities; design of curriculum; instructional areas; school staff and administration; support services; and plant and facilities). Finally, all demographic and perceptual data as well as other documentation will be compiled into a self-study profile of the school. Each profile will contain goals, need statements and priority need areas.

At the completion of this Self-Study phase an External Review Team, comprised an equal number of local educators and persons appointed by the North Central Committee, (when appropriate for accrediting purposes), will conduct an onsite visitation to review and verify the needs data contained in the school study and to comment on the developed goals.

III. COOPERATIVE PLANNING

Building staff members will then organize into task forces to review data and develop or identify plans for addressing the highest priority need areas. For example, a task force may be developed to address the high absentee rate in a school. Their role is to study the problem and develop strategies for addressing it at the building level. These plans will be reviewed by the Planning and Evaluation Team, the principal and the local members of the Review Team to ensure that they are feasible, as determined by their correspondence to goals, budget, policy, etc. During the planning phase, the Consultant will provide assistance in organization and will

supply necessary resources. At the end of this phase, the building staff will organize to prepare for pilot implementation of their plans in the fall. At this point they may reorganize the task forces by combining those with similar strategies or utilize the planning and evaluation team for organization.

IV. PILOT IMPLEMENTATION/ EVALUATION

A pilot implementation is a field testing of the program, usually on a small scale. During this phase the building staff will conduct thorough evaluations of each pilot program to identify strengths and weaknesses for improving the pilot project. The External Review Team will review the progress of the pilot efforts and provide feedback to the Planning and Evaluation Team on techniques for improvement. A report of the results of the piloted projects will be submitted to the building principal, and other appropriate persons. The Planning and Evaluation Team and other necessary personnel will modify and reorganize the programs for full-scale implementation the following year.

V. FULL-SCALE IMPLEMENTATION/ EVALUATION

To ensure that the programs are afforded the opportunity to gain acceptance and to become part of the daily building operations, they will not be subjected to major evaluations until they have been fully implemented for a three year period. During this period the Planning and Evaluation Team and Consultant will continually review the progress of each project. During the third year of full-scale implementation, the Planning and Evaluation Team will design and conduct a comprehensive evaluation of the implemented programs. At the end of the third year of full-scale implementation, the External Review Team reviews the progress of the programs and submits a report on the process to the Board of Education.

MAJOR ISSUES

There are a number of issues raised by the model described in this paper. Members of the Office of Curriculum Planning and Evaluation would appreciate input on the following:

1. What is the most appropriate approach to fund building level planning and evaluation efforts? (pay curriculum writing rate to teachers, allow release time for administrators and teachers for project activities, allow modified time scheduling for participating schools, provide grants for partial payment, etc.)

2. Should building participation in the process be voluntary or mandated district-wide?

3. How are individual building staff members selected to participate? (voluntary, selected by the principal, staff nomination, etc.)

4. Will the potential benefits of the collaborative effort to improve services (i.e., systematic needs assessment, allocation or resources to the highest priority needs, etc.) merit the amount of work involved?

5. Would management personnel within this district make decisions, related to the allocation of resources, based on data collected in a building level needs assessment?

6. Can the model be implemented in such a way as to assure all involved parties adequate "ownership" in the process; that is, can all parties to the process accept their functions as proposed in the model and, consequently, any decisions made as a result of its implementation?

7. Is the infusion of this process with the North Central Accredidation format practical and feasible or should this be perceived as an alteration to North Central?